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FARIAS, Lisette <<http://orcid.org/0000-0003-4238-3049>>, LALIBERTE RUDMAN, Debbie, POLLARD, Nicholas <<http://orcid.org/0000-0003-1995-6902>>, SCHILLER, Sandra, SERRATA MALFITANO, Ana Paula, THOMAS, Kerry and VAN BRUGGEN, Hanneke

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Critical dialogical approach: A methodological direction for occupation-based social transformative work

Lisette Farias^a , Debbie Laliberte Rudman^b, Nick Pollard^c , Sandra Schiller^d, Ana Paula Serrata Malfitano^e, Kerry Thomas^f and Hanneke van Bruggen^{g,h}

^aDivision of Occupational Therapy, Karolinska Institutet, Sweden; ^bSchool of Occupational Therapy and Occupational Science Field, Western University, Canada; ^cSchool of Occupational Therapy and Vocational Rehabilitation, Sheffield Hallam University, UK; ^dFaculty of Social Work and Health, University of Applied Sciences and Arts Hildesheim/Holzminen/Goettingen, Germany; ^eDepartment of Occupational Therapy, Post Graduate Program in Occupational Therapy, Federal University of São Carlos, Brazil; ^fDirector InterPART and Associates (International Partners in Action, Research and Training), Australia; ^gDirector of FAPADAG (Facilitation and Participation of Disadvantaged Groups) Netherlands; ^hSupervisor of the Occupational Therapy Programme of the Iv. Javakhishvili Tbilisi State University, Georgia

ABSTRACT

Background: Calls for embracing the potential and responsibility of occupational therapy to address socio-political conditions that perpetuate occupational injustices have materialized in the literature. However, to reach beyond traditional frameworks informing practices, this social agenda requires the incorporation of diverse epistemological and methodological approaches to support action commensurate with social transformative goals.

Aim: Our intent is to present a methodological approach that can help extend the ways of thinking or frameworks used in occupational therapy and science to support the ongoing development of practices with and for individuals and collectives affected by marginalizing conditions.

Method: We describe the epistemological and theoretical underpinnings of a methodological approach drawing on Freire and Bakhtin's work.

Results: Integrating our shared experience taking part in an example study, we discuss the unique advantages of co-generating data using two methods aligned with this approach; dialogical interviews and critical reflexivity.

Discussion: Key considerations when employing this approach are presented, based on its proposed epistemological and theoretical stance and our shared experiences engaging in it.

Significance: A critical dialogical approach offers one way forward in expanding occupational therapy and science scholarship by promoting collaborative knowledge generation and examination of taken-for-granted understandings that shape individuals assumptions and actions.

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Introduction

Occupational therapists are increasingly promoting an agenda of social reform to address the socio-political process and conditions that contribute to maintaining occupational injustices. They argue that enacting this agenda requires the incorporation of diverse epistemological and methodological approaches [1–5]. However, reaching beyond traditional ways of thinking or frameworks informing practices to address social disparities has placed practitioners at uneasy crossroads [1, 6]. As articulated by Frank and Zemke 'addressing this set of concerns – the unevenness of global wealth, differentials in the protection of human rights and obstacles to the exercise of personal agency

and political power – represents an upheaval in thinking and action within the occupational therapy profession' [7,p.112]. Based on this reality, it is important to build a repertoire of research tools that offer different perspectives and enable action commensurate with social transformative goals. We argue that critical dialogical approaches have the potential to generate reflection among people (e.g. scholars, practitioners, citizens) who want to better understand a topic as a first step to promote change oriented towards social justice [8]. Reflecting through dialogue can in turn give rise to (new) knowledge about power relations and socio-political conditions specific to the problems people are facing, including actions for improving their situation [8].

CONTACT Lisette Farias  Lisette.farias.vera@ki.se  Karolinska Institutet, NVS, Alfred Nobels Allé 23, 141 83 Huddinge, Stockholm, Sweden

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Within this article, we draw on our shared experience employing a critical dialogical approach in a study aiming to advance critically informed and socially responsible occupation-based work. This study, referred to throughout this paper as the example study, employed a critical dialogical research approach to promote occupational therapists and scientists' reflections on their social transformative practices [9]. In this article, we present this critical dialogical approach and explain how it is commensurate with critical social theory and transformative scholarship. Moreover, we integrate our reflections on the procedures developed in the example study, with the intent to offer up these ideas for further dialogue regarding this methodological approach. This material can help extend the frameworks that support theories and models used in occupational therapy and science in order to support the ongoing development of social transformative work.

For this purpose, in each section of this paper, we present the theoretical features of this methodological approach and illustrate our specific research application. To start, we briefly introduce the development of a social transformative agenda within occupational therapy and science, highlighting the importance of expanding predominant ways of thinking. Then we present an overview of our example study. The third section introduces the methodological approach drawing on Freire and Bakhtin's work on dialog. The fourth section describes the methods used in our example study; dialogical interviews and critical reflexivity. Then, we discuss key considerations when using this approach and methods. We conclude by considering the wider implications of this innovative methodology in the context of occupational therapy and science in the social field.

A social transformative agenda related to occupation

Although there is no one definition of social transformative work in the occupation-based literature, several authors have argued for the potential of occupation to enact social transformation [5,10–12]. Within this paper, the term social transformation related to occupation is employed to denote scholarship, informed by critical social theory, that places emphasis on power relations and socio-political conditions that extend beyond individuals and shape their occupational possibilities for participating in society [6]. Such scholarship involves processes spanning the continuum of knowledge construction (research) and action (practice) that emerge from collaboration with

people who experience varying forms of systematic disadvantages, and that seek to build a more just society through occupations.

Occupational therapy has long historical roots of involvement in work claiming to optimize social inclusion of persons experiencing challenges to occupational participation [13–15]. However, despite claims regarding occupational therapy's birth in social reform, scholars have argued that an early identification with medical rehabilitation diverted the profession from such social commitments [7,16,17]. As articulated by Pollard and Sakellariou, 'as a clinical practice concerned with medical conditions the profession was less concerned with the social history of inequality, which contributed to the distribution and experiences of illness and disability. The prescription of interventions for specific conditions is different from the development of practices for social change' [16,p.8]. Nevertheless, there are scientific studies indicating a growing interest in enacting social transformation through occupation within and beyond the health sector. This is apparently influenced by recent events, such as the social crisis in Europe [18,19], climate-related disasters across the globe [20], and the wealth concentration and increasing inequities associated with the global expansion of neoliberalism [21,22]. As such, projects that employ occupation at the core of their actions (i.e. occupation-based work) to generate knowledge about and address the socio-political conditions that maintain inequality have developed in diverse geographical locations [1,4,5,23].

Of relevance to the methodological focus of this paper, there have been discussions about the need for ways of thinking and doing within knowledge generation processes that better support social transformative work [1,24]. Some examples of this expansion are; the emergence of occupational justice and occupational rights concepts [25,26], the reconceptualization of occupation as a situated political phenomenon [5,10,27], and the promotion of collective and partnership approaches to reframe the relationships with the people with whom we work [3,28].

At the same time, the emergence of issues of social transformation, power, and justice in occupation-based literature is not without debate and tensions. A disconnect between the epistemological foundations of occupational therapy and science (what is believed to be true and known), the stated intentions for working towards social transformation (what it is said we do), and the enactment of these foundations in society (what we do in practice) has been fore fronted as problematic [6,24]. Farias and colleagues [6] associate

this tension with the epistemological foundations that have bounded the practice and study of occupation within individual-focused approaches and positivist notions of science. Whiteford and Townsend [24] relate this disconnect to a reliance on biomedical sciences, which have higher status and privilege in institutions and health-related discourses and often result in replacing occupational issues with biological issues [24,29].

Several scholars have argued that frameworks such as social transformation belong to a different paradigm than the contemporary positioning of occupational therapy and science within health sciences and biomedicine [1,4,30,31]. Fransen and colleagues [28] argue that even within an occupational therapy practice that promotes a client-centred approach, there is often a reliance on a functionalist paradigm that tends to be mechanistic. Yet, in practices that aim to be transformative, there is a need for reflecting on why things are done (e.g. what conditions (re)create injustices) rather than just learning how to do [28]. As such, critical reflexivity is central to the critical dialogical approach forwarded in this paper due to its potential to problematize the paradigms or set of assumptions underlying the practices that are focusing on social issues that (re)create occupational injustices [1,6,24,32].

Overview of the example study

The example study was conducted by the first author as part of her doctoral dissertation [9], supervised by the second author, and facilitated by the participation of five scholars (the contributing authors that appear in alphabetic order). The first author led the writing of this manuscript and the contributing authors supported this process through reflexive dialogue and intellectual editorial support in crafting the work for publication.

Ten potential participants were contacted by email by the first author based on publicly available information regarding their involvement in occupation-based social transformative work. Five individuals consented to participation upon receiving the informed consent form. Participants' experiences ranged between 10 and 30 years, working in countries such as Germany, UK, and Brazil, and others in Africa, South-Asia and Eastern-Europe. Their work encompassed projects within the areas of occupational therapy education, community development, adult literacy, and poverty reduction. Study procedures were approved by the appropriate university ethics board.

To obtain a multi-layered understanding of participants' projects and how they think about and act in relation to the challenges and opportunities that arise within their projects, three in-depth dialogical interviews and a process of reflexivity were conducted with each participant. These dialogical sessions lasted between 60–90 minutes and were conducted both in-person and via Skype. As well, each participant was invited to engage in a process of critical reflexivity apart from the dialogical sessions. This process entailed sharing the transcripts of the data collected with the participants. All five participants accepted to engage in this process, receiving a copy of their own transcript and a brief critical reflexive document constructed by the first author (6 pages or less) after each session. The document contained quotes drawn from the transcript as well as researcher's critical reflections, notes and questions for the next session. It is worth noting that the study example has been described more in detail elsewhere [in press].

A critical dialogical approach

The methodological approach presented in this paper combines a critical and dialogical stance. A critical ontological and epistemological position [33] has the potential to enact a multiplicity of definitions of dialogue, all of which emphasize the ways in which social reality is (re)produced through discourse embedded within relations of power and political, economic, cultural and other factors [34]. While critical social theory encompasses a range of perspectives and positionalities, they share a commitment to exposing, illuminating, and/or transforming how injustices are socially perpetuated [33,35,36]. Thus, as a central feature, critical dialogical approaches support efforts that seek to increase possibilities for social change by enacting dialogue as means to illuminate and problematize the systemic causes of injustices [37].

A dialogical stance encompasses an evolving group of theoretical approaches and positionalities, which enable diverse applications. For example, a dialogical approach can be used as a research method, pedagogical technique, and as an approach to reflexive practice development [38]. Dialogical approaches can also be enacted in the analysis of personal or collective experiences in broader contexts, and for examining relations of power [39]. Based on this diversity, it is crucial to clarify which theories are used to frame a dialogical approach. Thus, in this section we describe the specific work drawn upon to support the critical dialogical approach employed in the study example;

specifically, Freire's theory of dialogical action and teaching [40] and Bakhtin's dialogic imagination [41].

Freire: Dialogical action

Drawing on Freire's approach [40], dialogue is used to enact processes that seek to (re)think and (re)create reality, that is, dialogue is more than the exchange of ideas [42]. This focus is aligned with transformative scholarship and a critical intent that seek to question and reflect on reality from multiple viewpoints, fostering knowledge that in turn can advance social transformation [37,43]. As articulated by Freire,

Dialogue is a moment where humans meet to reflect on their reality as they make and remake it. Something else: To the extent that we are communicative beings who communicate to each other as we become more able to transform our reality, we are able to *know that we know*, which is something *more* than just knowing. [...] Through dialogue, reflecting together on what we know and don't know, we can then act critically to transform reality [42,p.13].

As such, Freire's approach was used in the example study to promote participants' critical reflection on their experiences enacting social transformative projects. It was expected that a critical dialogue would help elucidate complex challenges emerging in social transformative occupation-based projects, and provide knowledge to inform future work in this field. From this perspective, dialogue was taken up in ways that would enable raising awareness (also known as conscientization) regarding the interpretive frames for action or ways of thinking that shape these practices [40].

Another Freirean key assumption is that dialogue should emerge from an egalitarian process in which people provide arguments based on knowledge, and not on power claims [40]. This assumption prevents dialogue from being mistaken for a conversation that can end up in an over-celebration of one's own location (e.g. power, status, privilege) which in turn can obscure the possibility of engaging with the object of knowledge in the first place [40]. For instance, in the example study, participants could have used the study to celebrate their achievements, expertise and knowledge, or in contrast the researcher could have taken control over the direction and development of the data. Rather, dialogue between researchers and participants was complemented by a process of critical reflexivity to prevent engaging in one-way communication or a situation where one person would act on another (see more in the methods section). This approach was important given that good intentions of

egalitarian dialogue do not necessarily break with the power relations present in research, and therefore there is a need to maintain constant awareness of relations of power. As Gómez and colleagues point out 'not only do researchers and subjects need to be willing to engage in egalitarian dialogue to assure that their interactions remain egalitarian but also do they need alternative structures and norms and a particular approach for organizing the research process that ensures greater equality' [8,p.239].

Bakhtin: Dialogical imagination

Bakhtin, as well as Freire, supports the notion of dialogue as an egalitarian process and assumes that ideas, far from being abstract, are full of social constructions that reflect social reality [41]. Based on these assumptions, Bakhtin brings attention to the role of ideology (i.e. dominant social and/or professional expectations and ideals) in the shaping of dialogue [37,41]. As such, ideas exchanged through dialogue are seen as formed in a continuing process of social interactions that shape one's own ideas as well as the ideas/assumptions of others [44]. For example, in the study it was assumed that participants' ideas regarding social transformation were informed by their experiences as well as professional discourses. Participants' ideas were in this sense understood as more than personal opinions, but rather as shaped by, and reflective of, their contexts and professional background.

Further, dialogue and discourse are seen as productive agents of everyday social life in Bakhtin's work. This implies that people's expressions of their ideas through dialogue constantly (re)produce discourse (i.e. system of ideas, attitudes, beliefs and practices), which in turn construct reality [45]. For example, discourses related to neoliberal notions of independence/dependence reflect systems of beliefs and expectations that tend to prioritize independence as a source of freedom, self-determination, and choice, while shaping the notion of dependence with values largely associated to lack of willpower, laziness or personal deficiency. As such, dialogical research can promote critical reflection on how certain discourses (re)produce the social imaginary that marginalizes, stigmatizes, and/or blames the victims of a system that perpetuates injustices [46,47]. For example, in our example study, social transformative work was challenged by suggesting that it can risk reinforcing discrimination whilst still waving the banner of social justice when reproducing neoliberal discourses predicted on individual responsibility and blame. Another idea critically reflected on through dialogue was that of the dangers inherent to a

disconnection of practice from theory or vice versa that can result in a sacrifice of intellectual reflection or 'thoughtless action', and/or a sacrifice of action 'actionless thought' [40].

Critical dialogical methods

Critical dialogical methods encompass a range of research methods, including traditional (e.g., observations, interviews), visual (e.g. photovoice, art installations), art-based (e.g. dance, theatre) and lyrical methods (e.g. poetry). In all instances, methods are used to examine people's assumptions in relation to broader discourses and relations of power operating within society. Moreover, these methods seek to examine the ways in which power relations influence how situations are socially constructed, including possibilities for action for varying actors within these situations. In this section, we focus on the methods used in the example study; dialogical interviews and critical reflexivity.

Dialogical interviews

In keeping with a critical lens and goals of social transformation, dialogical interviews aim to understand taken-for-granted situations, beliefs and practices [48] that shape individuals' situated practices. To stimulate engaged dialogue, this type of interview seeks to be egalitarian and flexible, allowing exploration of issues perceived by researchers and participants as important and that affect the interests of both parties [48–50]. Therefore, to avoid creating an interrogation or one-way interview, this type of data collection requires that those involved are seen as egalitarian partners [40]. From a critical stance, working towards the ideal of egalitarian dialogue requires that all those involved share responsibility in making sense of their experiences and assumptions and the power relations that exist before and during the study [40]. Thus, dialogical interviews provide space for working towards egalitarian relationships by deliberately recognizing how power plays a role in the researcher-participant relationship.

To stimulate in-depth exploration of a topic and to provide a space for each individual's account, dialogical interviews are loosely structured [51,52]. In the example study, this meant that the researcher developed an interview guide consisting of overarching questions for the first session and potential open-ended prompts for the second and third session. Examples of questions used in the first session are: –Could you tell me about the types of projects that

you are or have been involved in? –Could you tell me about the transformative nature of your project?

The flexible format allowed for variations in the second and third session from participant to participant depending on issues that surfaced in the first session. These variations opened possibilities for enhancing the understanding of how each participant thinks and acts in relation to their work, without trying to generalize their experiences, and kept the focus on how power relations and contextual factors influence their practices. The overall focus of these following sessions was on gaining an in-depth understanding of the issues raised by each participant, provoking unpacking of professional and broader discourses that may conflict in their practice. For example, some questions were directed towards enhancing the understanding of how participants negotiate required resources for their projects (e.g. funding), and/or how they sustain their efforts after leaving the context of practice. Additionally, in the third session the participants were invited to envision new possibilities for advancing occupation-based social transformative work. This act of envisioning is based on Freire's notion that the integration of imagination in dialogue is crucial to link people's realities to potential actions [42].

Thus, in line with the dialogical nature of the method, the researcher drew on what was being told during the sessions to ask questions that explored participants' contextual reality making it possible for both the participants and researcher to recognize the interaction between the various components that shape their practice [40,41]. The exploration of participants' contextual reality is essential from a critical stance since it draws attention to broader social issues that (re)create boundaries, as well as raises awareness of how practices are grounded in professional and sociohistorical discourses and processes.

Critical reflexivity

Critical reflexivity is a form of reflection that involves moving beyond reflection to question the processes by which professional discourses and knowledge that shape practice are constructed [53]. This makes critical reflexivity a valuable tool for not only addressing the symptoms but also the root causes of occupational injustices, as well as the role of occupation within the hegemonic social order. To enact critical reflexivity, transcripts and the researcher's critical reflections were shared with participants. The purpose of sharing these documents was to encourage participants to be critically reflexive regarding ideas exchanged in each dialogical session, to challenge the interpretations and

assumptions of the researcher, and to build on these reflections in the following sessions.

Transcripts

The practice of inviting participants to review their interview transcripts has been used in qualitative research predominantly as ‘a process whereby interviewees are provided with verbatim transcripts of their interviews for the purposes of verifying accuracy, correcting errors or inaccuracies and providing clarifications’ [54,p.9]. In contrast to approaches for validating research findings, such as member checking [55] or triangulation [56,57], in the study we focused on sharing transcripts with participants to enhance collaboration and critical reflexivity throughout the research process. Collaboration aligns with critical social theory because the intent of the process is to respect and support participants in a study, building the participant’s view into the study [58]. Based on this assumption, participants were encouraged to feel free to not only edit transcripts but also to add their reflections or clarifications. Although participants interacted differently with their transcripts, all participants corrected errors/omissions and/or added minor clarifications, and the majority added critical reflections that offered new insights or further articulated key points. Indeed, as showed in Figure 1, participants’ reflections deepened the data by providing more thoughtful and time-considered statements.

Although some scholars have expressed concern that sharing transcripts increases the risk that participants will add numerous new and substantive comments that make the transcript no longer accurately reflect the verbal exchange during the interview [54], we drew on critical and dialogical perspectives that emphasize processes of transformation, (re)invention and critique [59]. Thus, from this standpoint, sharing transcripts is a valuable option for promoting critical

reflexivity, collaboration, and co-creation of the research agenda.

Critical reflections

The researcher’s critical reflections were shared with participants to stimulate a process of critical reflexivity regarding issues emerging in the data, as well as to add another opportunity for discussion to the process [60]. The process of developing the critical reflective notes usually began during the dialogical sessions. With consent, the researcher took hand-written field notes for all sessions to document her own thoughts, as well as to draft questions for upcoming sessions. Following the sessions, the researcher focused her writing on contrasting her experience/knowledge with participants’ experiences/knowledge and trying out her assumptions. As such, each critical reflexive document was different since it was based on each participant’s level of engagement in the sessions and with the documents sent to them. The following is an example of the researcher’s critical reflections based on one part of a dialogical session (See Figure 2).

By engaging in this process, the researcher had an opportunity to expose and question her assumptions which provoked new insights and in-depth understandings of her own and participants’ viewpoints. It is worth noticing that this process was challenging for the researcher conducting the study (at that time she was a PhD candidate) and therefore constant dialogue with her supervisor was necessary. Nevertheless, interchanging critical reflections, in the case of the example study and other settings, can provide space for researchers to scrutinize their positionality and assumptions, and compensate for power imbalances between those involved.

Although all participants expressed deep involvement with the documents shared with them, different participants engaged with the documents for different

that person might not be able to clothe that child properly because is about resources, you know. That child should be at school, you know. But what are they getting out of school, because they don’t actually speak the language and the school has yet to make accommodations for these children, so ... so there can be all those kinds of issues which are going to stand in the way of a collaboration. If I’ve got a uniform or if I’ve got ... you know, if was practising ... I suppose I would look like an OT. You know, I’ve got the pair of jeans and a pair of sandals on. And I’ve got a, sort of, computer briefcase. And I get out of my car, walk into your house,

And what I think is quite a difficult concept, is this client-centeredness. For always they defend it that the client wants this. Yes – yeah, my child also wants to have a lolly and a sweet, but ... Yes, I have to convince her that things are better not to take and yeah, that there are alternatives. So how do you learn people really to choose?



This point might not be very clear. What I am saying is that there are codes of dress which professionals use when they are dressing down which are to do with what their employers find acceptable, and what they imagine to be fairly neutral and comfortable - but they are still professional middle class dressing down kind of clothes so it is obvious that they are mental health professionals



How can people make occupational choices not only for themselves but which are beneficiary also for society?

Figure 1. Extract from two different transcripts with participants’ critical reflections.

periods of time and in different ways. For example, some participants focused on clarifying their position while others added links to relevant literature that would expand ideas shared in the session, and/or inserted their critical reflections, promoting active discussions with the researcher. For example, the following participants engaged in discussion, inserting their critical reflexions by using the word processor feature 'track changes' (See Figure 3).

Discussion

Drawing on the challenges and opportunities that emerged in the example study, this section presents key considerations when conducting a critical dialogical study. It is worth mentioning that specific considerations might vary depending on the particularities of each project.

Democratization of the interview process

Research interviews are often presented as one-directional questioning where the role of the researcher is

to ask questions and the role of the participants is to answer those questions [61]. In this sense, interviews are distinctive and atypical speech events infused with social expectations heavily focused on participants' articulation of their experiences [62]. Even though interviews in qualitative research presuppose to reduce power differentials and encourage disclosure and authenticity between researchers and participants, the relationship and distribution of power between them can vary depending on the different paradigms underlying the research [63]. This suggests that 'participants are not always considered to be the real experts' [63,p.281]; an assumption that can create dichotomous, predetermined and/or mutually exclusive roles between researcher and participant. The risk inherent in maintaining dichotomous roles is that this separation can affect the type of data collected [63]. For example, if the role of the researcher is to be a neutral recipient, such positioning can dissuade participants from expressing their opinions freely [62].

Dialogical interviews are based on the belief that power differentials often emerge from the uneven

Similarly, I found it very interesting what you said about *"the conflict trying to work in a health system for people who didn't fit"* (p.1). As I reflect on what it is that we are promoting in OT, it seems that our positioning within the health system or rehabilitation field has made us part of a large discourse that promotes 'helping people become as normal as possible' implicitly trying to fix individuals (e.g. make them fit into a society) instead of helping societies to embrace diversity and other ways of being and doing in the world (e.g. other ways of moving, doing with different types of support). Thus, I wonder if the tensions that you experienced were related to the way a medical approach aims to 'fit' people into society or if there was something else that produced the tensions?

Figure 2. Extract from researcher's critical reflections of one dialogical session.

I associate this biomedical approach with a strong reliance on positivist perspectives (e.g. we usually measure child development using measures that stem from normal distribution curve) that embraces 'normality' as the only way of being, perpetuating the gap between 'them and us'. This tendency to valorise normality has also provided us power and a position to judge who is able and disabled, a focus aligned with the biomedical model (i.e. emphasis on biology, pathology and the scientific method) that focuses on 'broken bodies', perpetuating a notion of disability as a tragedy that provides us with a 'job' that involves helping people to come 'back to normal' or 'as normal as possible'. In that sense, it can be said that OT contributes to social exclusion of people with disabilities by objectivizing their bodies/body functions as 'things' that need to be fixed. Although there have been calls to shift this focus from deviance or abnormality

Similarly, you raised an important aspect of occupation related to its temporality (nowadays limited to Western conceptualization of time and space). *"So there isn't a beginning point, really, and there isn't an end point, because it's a continuous process. Social action doesn't ... you know, history doesn't stop and it doesn't start either. You know, it merges"* (p.2). *Start to recount things. And it may well be that it has to be as fluid as that, that when we look back at what we've done we might not understand everything about the context. We may not understand our purpose very well"* (p. 2). In this sense, occupation related to social actions and transformative processes could embrace other conceptualizations of time, for example to understand that social change takes time, maybe generations, and that processes are fluid and do not always have a clear beginning or end. Am I capturing that idea or did you mean something else?



For me the OTs have left probably this idea of normality, but they make real participation often not possible, they work still too much on functionality and do not consider enough the structures/systems and the bigger environment (Social determinants of health) which caused the disability.



That's right. Occupational ideas have to take better account of historical as well as personal and community narrative process, but also the problems of historical perspective which are about how we perceive history through different lenses and interpret it in different ways - it makes no sense to consider history as a 'science' although this will be a point that some may argue. History is partisan. As we know from the southern experience of occupational therapy the history of occupational therapy itself is that it is an instrument of policy, a bit player in a larger game of colonial influence, cold war politics, which conferred a mixture of benefits and medicalised perspectives. A possible example may be given in Joubert's (2010) exploration of OT in apartheid south Africa, although I suspect there might be more of a story to tell there.

Figure 3. Extract from researcher's critical reflections with two participants' critical reflections.

social positionality of participants and researchers, recognizing that most of the power when conducting research traditionally lies in the hands of the researcher [61,63]. This means that although dialogical interviews seek to create a two-way dialogue to democratize the process in which the data are constructed, yet this does not mean that dialogue is seen as completely egalitarian. Instead, a critical dialogical approach advocates for revealing those power differentials and attempting to compensate for them through consensus, empathy and respect.

In the case of the example study, there was a perceived parity regarding the professional background of those involved, but there was a knowledge and status imbalance between the researcher conducting the data collection and the participants who had a higher academic status and/or extensive experience than the researcher. To compensate for this imbalance, the interviewer drew on her theoretical knowledge regarding the topic under study to bring in issues that did not explicitly surface in the sessions. At all times, the researcher embraced a transparency framework [63] regarding her research agenda, being mindful of participants' potential motivations so that they could clearly benefit from taking part in the study. Likewise, since the study aimed to gather knowledge gained throughout participants' expertise, it was essential for the development of the study to build a respectful relationship between researcher and the participants. This meant that the study would analyze the participants' experiences to learn and find other alternatives for action but not seek to expose their 'dirty laundry' [63]. Some examples of actions undertaken by the researcher to enact democracy and transparency were: booking time with each participant who asked to discuss the research process, revealing researchers' reflections regarding data when asked and through reflexive notes, and including the questions that participants brought up in the dialogical sessions. This meant that the researcher needed to have some flexibility, and allocate extra time for reviewing participants' critical reflexions and having discussions with participants regarding expectations of participation, and responsibilities and rights throughout the research process. These discussions served as a place to recognize the power differentials between researchers and participants and possibilities for counterbalancing those imbalances.

Data ownership and control

Conflicts regarding control and ownership of data have been reported in the literature [64,65], offering a few glimpses into how sometimes even in qualitative

research, data are seen as separated from the participants and under control of the researcher who becomes the main storyteller [63]. The assumption that researchers have full ownership of the data collected has the inherent risk of converting participants' accounts into 'the researcher monopoly of interpretation' [61,63]. To mitigate this risk, critical dialogical studies are based on the notion that both participants and researchers have rights (e.g. to own and edit data) and obligations with respect to the information shared (e.g. engaging with the data) [40]. This implies that data are seen as the result of shared effort between all those involved and not a replication of participants' or researchers' opinions [40].

In the example study, attempts were made to share data ownership and control. Participants were given a copy of all their transcripts so that they would own the material and use it in ways that would benefit them (e.g. further their own reflections and practice, use them in their academic writing and teaching). In this sense, participants' ownership of data influenced their level of interaction with the transcripts and researcher's critical reflections, which in turn resulted in participants gaining greater control over the research process (e.g. they could protect their interest, influence data collection, express their concerns, and challenge the researcher's reflections). It is worth noting that the process of sharing and (re)reading transcripts can be both lengthy and cumbersome, and although participation in these processes is voluntary, participants who wish to take part may be negatively impacted by the time and effort required [54]. Additionally, sharing transcripts via email and communicating via Skype were not a problem for those involved in the example study, yet individuals' literacy levels, capabilities, and technology/internet access should be considered beforehand.

Relationships and levels of partnership

Relationships between researchers and participants can vary from a high level of partnership in which there is a strong loyalty and commitment of both parties, to a highly dichotomous and asymmetric level of partnership [63]. In this continuum, we argue that dialogical studies should seek high levels of partnership while acknowledging that power is always present in researcher-participant' interactions. As such, it is essential that researchers reflect on the power relations that exist before, during and after a study is conducted, and how power affects partnerships. Per this position, the researcher's task is to use her/his expertise, skills, and ethical commitment to develop a strong

partnership and commitment to participants and their interests, including possibilities for participant involvement throughout the study. Undoubtedly, while the ways in which researchers plan to involve participants in the research process might vary, there should be explicit intentions of sharing responsibilities with participants so that their opinions regarding the study become a constant presence [63].

In the example study, the theoretical frameworks and methods were chosen to enhance the relationships between the researcher and participants by offering a less hierarchical and more transparent agenda. For instance, before the example study started, transparency was enacted by communicating with participants about the impossibility of guaranteeing full anonymity due to the public nature of their work and visibility as experts in the social field. However, steps were taken to support the confidentiality of the data that participants shared, such as through removing names from transcripts and critical reflections. Nevertheless, maintaining anonymity in manuscripts where quotes are used was a challenge since others could potentially identify the responses of the participants if these contained specific information regarding their projects. To minimize that risk, preliminary findings and manuscript drafts were shared with participants so that they could decide if their anonymity was at risk or if they preferred to disclose their identity. Indeed, the option to waive anonymity is one that should be open for discussion in a dialogical project given the role of participants, for example, as potential coauthors, and the purposes for which they may want to have their contributions identified. As such, these steps directly and/or indirectly facilitated the development of respectful relationships based on mutual trust and an acknowledgement of one's equal right to information regarding all aspects of the study.

Final considerations

In enacting a social transformative agenda, scholars and practitioners require different and more egalitarian and reflexive ways of thinking and acting. However, for these ways to be enacted, they have to be acquired through professional education and research training. This requires shifting away from educational approaches and research frameworks that provide mechanisms that maintain an expert status and practitioner/participant distance, such as, for example, frameworks of practices and guidelines that delineate how and what types of problems are to be identified [16,66]. At the same time, the construction of occupation-based knowledge and research has also

created parameters and opportunities for re-envisioning the role of practitioners and scholars [7,67]. Capturing social transformative processes has proven to be difficult, especially because of the way that the profession and discipline has defined research by biomedical terms [24]. Consequently, there is a need for radical openness by problematizing the established ways of studying occupation to promote different alternatives for advancing occupation-based social transformative work.

Based on our shared experience employing a critical dialogical approach, we argue that a critical dialogical approach has the potential for supporting transformative processes by creating spaces where dichotomous roles can be challenged, diverse types of knowledges can interact, and what has come to be 'taken for granted' can be critically attended to. Despite practical challenges of employing this methodological approach, its theoretical foundations support its use for enacting egalitarian processes amongst those involved. It is worth noting that the example study is only one possible application of this methodology, which means that several modifications can be made to enact dialogical processes in different contexts and with diverse groups. For example, the number of sessions used in the example study was determined by the first author's dissertation timeline. Given that dialogue and critical reflection are ideally long-lasting collaborative processes, it is recommended that future studies explore mechanism to enable on-going dialogue.

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ORCID

Lisette Farias  <http://orcid.org/0000-0003-4238-3049>
Nick Pollard  <http://orcid.org/0000-0003-1995-6902>

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